

# Completing Case Individual

CBMS | Process Manual | Revised: January 2022

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## OVERVIEW

This document provides a step-by-step guide for how to update the Case Individual page in CBMS.

## PROCESS

1. Log in to CBMS.
2. Navigate to the case by entering the Case Number in the **Global Search** bar on the Home page.
3. Click on Case Number in the results table to access the **Members** page.
4. From the Members page, hover over the **Actions** button.
5. Select **Begin Interactive Interview** to initiate the II queue.
6. Navigate to the **Case Individual** page.
7. From the **Name** dropdown, select the appropriate person.
8. The **Effective Begin Date** is automatically populated.
  - a. Refer to **Online Help** for which date you should use if you are updating an ongoing case.
9. Select the appropriate radio button for if the individual is **In Home**.
  - a. If 'Yes' is selected, some fields become enabled and are mandatory.
    - i. Select the appropriate **Verification** option from the dropdown menu.
    - ii. Select the appropriate **Source** option from the dropdown menu.

10. Enter the **Date Reported**.

11. Enter the **Date Verified**.

12. Click **Save**.

13. Repeat steps 7 through 12 for each individual in the household.

a. Step 1 Level 2

Use Tab Key or Toolbar Icon  to increase and

Shift+Tab Key or Tool Bar Icon  to decrease indentation/list level

b. Avoid interrupting lists like this, use a Soft Return (Shift+Enter) or include it as a sub-list item

i. Step 1 Level 3

1. Step 1 Level 4

14. Step 2 Level 1

15. Step 3 Level 1

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## ACCESSIBILITY

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